



State of Minnesota
Department of Human Services

Community Supports for Minnesotans with Disabilities
444 Lafayette Road N
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Annual Progress Report - Year 2 (February 1, 1998 - January 31, 1999)
Minnesota's Self Determination Project - Robert Wood Johnson Foundation Grant # 031177

Overview

The second year of Minnesota's Self Determination Project concentrated on operationalizing Year One Project frameworks. Education, system redesign and the development of individually controlled resources continued to be the focus of activities and contracts. Regional differences across local project sites provided opportunities for a variety of methodologies to be piloted. Project frameworks were strengthened through collaboration with consumers, families, providers, advocates and community members. Such collaborative efforts assisted to promote self determination principles and to yield measurable outcomes.

Consumer Characteristics

As of January 31, 1999, ninety-nine consumers are Project participants. There are 531 additional consumers who have been positively impacted by self determination philosophy and methodologies, although they have chosen not to be part of a formal project. The number of consumers interested in self determination exceeded Project expectations for the second year of operation. TABLE 1 contains general consumer characteristic information.

TABLE 1 - Consumer Characteristics

Number of consumers	Age Range	Living Arrangement	Support Level	Where Supports Provided	How Supports Provided
99	4 - 66 years	-Family foster home -Shift staff foster -Family home -ICF/MR -Own apartment/home	-Semi-independent -Moderate -High	-Home, -Businesses, -Schools -Work environments (includes DT&H)	-Informal/generic -Licensed providers -Community services -Medicaid, state, county, and personal funds

REPORT QUESTIONS

1. What are the Project's objectives and how has the Project met them in this year?

Goal # 1: Improve management and administration of services

Objective: 1a: Provide local entities responsibility for local resources and implications for their use

Progress Status: Medicaid waiver amendments that promote self determination were approved by HCFA in December 1997. Local project sites have been assisting consumers to individualize and direct their own supports through use of the amendment provisions. Technical assistance for implementing creative support options is on-going. A self determination focus group, the Future's Initiative, has initiated legislation that supports consumer-directed supports.

Objective 1b: Develop service approaches to meet the needs of the geographic area being served

Progress Status: Person centered planning facilitators are available to meet individual consumer planning needs. Project sites have developed and implemented education plans specific to identified local issues.

Objective 1c: Increase incentives for people to remain in local communities

Progress Status: Medicaid waiver amendments approved by HCFA in December 1997 promote individualized supports building on local community resources. All local project sites are working with providers to support consumer choice to live and work in the community the consumer chooses. A housing workgroup has developed strategies for promoting consumer controlled housing. Efforts to decrease public guardianship have strengthened person centered relationships promoting community connections.

Objective 1d: Support local communities to analyze and expand capacity to meet the needs of local citizens

Progress Status: Project counties have assessed their available resources to meet needs. Activities outlined in Objectives 1b and 1c support this objective. Local project sites implemented action plans that are focused on building community supports. Such efforts were based on the generic strengths of the community and building self sufficiencies at the local level. See Table 3 for site specific activities.

Objective 1e: Increase competition among service providers and choice of service providers

Progress Status: Project counties have promoted the development of non-traditional support options. The state and local project sites have provided consumer focused training and self determination information to providers and state provider organizations. Provider organizations are developing strategies to focus on customer service. A Consumers Reports guide that profiles providers is in the final development stage.

Goal # 2: Improve service financing and design

Objective 2a: Provide for and support individual resource allocation and choice

Progress Status: Each local site has developed methodologies for creating and implementing individual budgets. Computer software is being developed to assist with budget tracking. Employer of record options have been developed and implemented. A resource allocation tool is being piloted.

Objective 2b: Support individuals and families who are controlling their own resources

Progress Status: Local project counties are using self advocacy agencies to promote consumer education. individualized assistance is being provided to each project consumer. A consumer handbook "Finding the Support You Need", which provides a "consumer friendly" format to address employer/employee relationship issues, has been completed and is being utilized. A Blue Earth County publication, "It's My Life" provides a reference for planning and managing supports.

Objective 2c: Develop and implement a rational means for resource allocation

Progress Status: A resource allocation tool is being piloted. The Project System Redesign Workgroup continues to work on strategies for funding flexibility and addressing access and equity issues.

Objective 2d: Integrate all expenditures into single budgets for flexibility and efficiency

Progress Status: Local sites have developed accounting systems to separately track funding streams, although funding for supports appear seamless to the consumer. Consumers know their support costs and are active participants in budget development. The Project System Redesign Workgroup is collecting and analyzing statewide data to develop an action plan for pooling resources. Blue Earth and Olmsted counties continue to participate in the managed care demonstration project.

Objective 2e: Develop methods and support to transition from obsolete services

Progress Status: Stakeholders, focus groups and steering committees representing provider and consumer organizations are working on transition strategies. On-going education and training sessions are key components for promoting consumer directed supports.

Objective 2f: Develop a basic package of services for all persons with developmental disabilities

Progress Status: Objective discontinued and approved as per Don Shumway's November 30, 1998 written correspondence. Project staff, consumers and stakeholders viewed the objective as creating a "one size fits all service system. A focus on activities that promote a more individualized, seamless and simple process for determining supports was determined to be a greater benefit.

Objective 2g: Support greater innovation and benefit in work and other day programs

Progress Status: The Medicaid MR/RC Waiver amendments approved in December 1997 increased flexibility for individualized supports. Work and day providers participated on advisory/steering groups to develop ideas for consumer-directed supports. Contracting processes were changed to increase options for consumers to hire supports from their employer rather than a traditional vocational provider.

Goal # 3: Improve access to services

Objective 3a: Increase equity in access and resources for persons with similar needs

Progress Status: A resource allocation tool is being piloted. The Project system redesign workgroup continues to work on strategies for funding flexibility and addressing access and equity issues. The Project has contracted with the University of Minnesota to provide a formative evaluation. One area of the evaluation will focus on the impact of resource allocation on consumers. This information will be available in Project Year 3.

Objective 3b: Increase access to and resources for culturally appropriate services

Progress Status: Cultural specific needs are being addressed at the local project sites through individualized person centered planning. A contract is being developed to provide consultation and technical assistance to the Project in building community connections across all cultures, improving access to culturally competent supports, and defining self determination across cultures.

Objective 3c: Provide for local experimentation with expanded eligibility

Progress Status: The completion criteria for this objective was changed and approved November 30, 1998 through written correspondence from Don Shumway. The Project will track the Managed Care Demonstration Project activities as a reference for future action plans. Report 1 from the University of Minnesota evaluation found that Minnesota's Self Determination Project design and methodologies are transferable to additional disability groups.

Objective 3d: Establish an ethical basis for access decisions

Progress Status: Objective discontinued and action approved as per Don Shumway's November 30, 1998 written correspondence. The Project System Redesign Workgroup will continue to address equity and access issues through Project Year 3.

Goal #4: Improve quality assurance and monitoring

Objective 4a: Design locally based systems of quality assurance with consumer and family input within guidelines established by federal and state governments

Progress Status: Project sites have developed and are implementing quality assurance plans. See Table 3 for individual project site activities.

Objective 4b: Make choice and control an integral part of the definition of quality

Progress Status: Project quality frameworks and action plans promote consumers defining quality and satisfaction for themselves based on choices made. Each local project site has incorporated choice and control as part of all planning and supports activities. The contracted evaluation will provide additional direction in this area.

Objective 4c: Link quality assurance systems with quality improvement support services

Progress Status: The first year of state consolidated standards implementation was completed. Local project sites have utilized ACD training outcomes from Minnesota's Performance Based Contracting Initiative. Local site evaluation protocols include quality improvement. The Region 10 Quality Assurance Initiative developed and began implementing a tool that involves consumer input for defining individual quality as well as the overall service delivery system.

Goal #5: Redesign Roles

Objective 5a: Renegotiate and redesign traditional roles of governmental administrative employees as necessary to achieve project goals

Progress Status: Local project sites are providing extensive training, mentoring, and support for changing case management roles. Blue Earth and Olmsted counties have developed a single individual service plan which supports redesign. The state CSMD division revised its mission and vision to focus on self determination as a philosophy for all division work.

Objective 5b: Establish appropriate support systems to assist local entities, consumers, families and service providers to fulfill new roles

Progress Status: Education activities at the local project level and input from consumer organizations have yielded direct service round table discussions, the development of support action plans, and implementation of public relation plans. The development of computerized tracking systems, handbooks, and consumer guides have provided support. The frameworks for peer mentoring were developed and are to be implemented in Project Year 3.

Objective 5c: Evaluate project implementation and outcomes to refine project as needed

Progress Status: Stakeholders, workgroups, consumer organizations, and contracted evaluation activities provide feedback on regular intervals throughout the Project. The University of Minnesota evaluation completed Report 1 covering the period from February 1997 through August 1998.

TABLE 2 provides a status report on Project tasks and time lines.

TABLE 3 provides information on state and local project site activities supporting the Project goals and objectives.

2. Have any internal problems been encountered during this year that are related to the Project's design, collaborations, staffing, operations, or other Project factors?

Changes in project support staff at the state and county level moderately impacted Project progress. Olmsted County's projected progress slowed due to the change in supervisory staff. In September, administration and project links were improved and progress activities were enhanced in the areas of accessing consumer support grant funds, developing checking accounts, improving contracting procedures, and enhancing service coordination options.

State division leadership, division reorganization, and project support staff experienced reassignments in Project Year One. The transitions associated with these changes continued into Project Year Two. Delays caused by the transitions are viewed as temporary and effected system redesign work, but not education or the development of individualized budgets.

Two project sites' self determination activities build on collaboration with Minnesota's Managed Care Demonstration Project. Delays in that demonstration project have caused delays for those local sites. Areas impacted include implementing a funding assessment/allocation tool, developing partnerships with some providers, determining rate capitations, and pooling funding streams. The two counties effected continually assess the impact of delays and adjust their methodologies and work plans accordingly. Although delays may impact methodologies used to meet objectives, it is anticipated that Self Determination Project objectives will be met within the three year time line.

3. Are there problems or successes caused by factors external to the Project?

Categorical funding streams, which could be considered external factors both at the state and federal level, create barriers for consumers to purchase supports in a simple manner. Gaining legislative support for system redesign is a slow process. Issue prioritizing from a political perspective is an external factor that can impede progress. The Self Determination Project is working with consumers, provider organizations and other stakeholders to plan and support legislative proposals and to educate communities.

Promoting self determination philosophy and methodologies in the public school system has been difficult. Development of single, coordinated service plans continues to be a challenge when many disciplines try to come together to support a person. Local Project sites began joint training sessions with school personnel to develop working relationships and promote self determination. This activity will continue in Project Year Three.

The Region 10 Quality Assurance Initiative tool has created a greater awareness of person centered thinking. Although this initiative is a regional effort, it has positively influenced Project work.

Provider licensing reform promoted provider involvement in person centered planning and outcome based service provision which supports self determination philosophy.

As referenced in question 2 above, Olmsted and Blue Earth Counties have experienced delays in activities that are linked to the managed care demonstration project. These delays create the need to revise materials and work plans.

4. If you are working in collaboration with other organizations, or depend on other organizations or institutions to meet the objectives of this Project, how are those relationships working?

The State and local Project sites partnership has been viewed as a positive relationship. Each local project site has emphasized collaborative efforts with local stakeholders, businesses and community organizations. These efforts continued to support education, information dissemination, and legislation into the second year of the Project.

Dakota County's collaborative efforts with Southview Bank, where consumer voucher checking accounts have been established, Dakota County Provider Training Networks, Arc Suburban, People's Rights Group, People First Suburban, and Mankato Rehabilitation Center, have developed positive results to support consumers in unique and creative ways.

Olmsted and Blue Earth Counties' work with People First and the local Arc has created opportunities to reach people outside of the typical social service network. The building of community connections has yielded employer of record options, self advocacy training and conference planning. Collaborative work with licensed providers has increased an awareness to focus on consumer centered businesses and not "people management".

5. Have there been any key dissemination activities during the past year?

As reflected in the Bibliography, information dissemination has taken several forms. State and local project staff met regularly with community groups, presented at conferences, and provided information to citizen groups, boards and councils. Communications and public relations activities have emphasized understanding and applying self determination principles.

Presentation and meeting experiences this past year have yielded valuable information. Because people have had limited experience with self determination, the Project found that a variety of dissemination methodologies is key to creating an in depth understanding of role changes, consumer directed supports, risk and informed decision making.

6. Does the Project have other sources of support?

Local project sites and community project supports have exceeded projected expectations. Consumer self advocacy groups, stakeholders, families, and community organizations have volunteered approximately 3,500 person-hours to support project activities. At the local project sites, consultation time and assistance from county departments not directly involved with the Project exceeded expectations.

Non-project counties such as Freeborn and Hennepin actively supported self determination by attending self determination meetings, sharing ideas and discussing regional issues.

7. What are your plans for the Project next year?

Next year the Project's work will continue to focus on education, system redesign, and promoting consumer choice and control. State and local advisory groups, workgroups and steering committees will assist to develop action plans and methodologies to address challenges. Planning for statewide implementation will be a priority. As part of this planning, target areas include technical assistance, education, incentives to promote self determination, state departments and local coordination and collaboration, quality assurance and system redesign to make self determination methodologies standard practice for Minnesotans with disabilities.

8. Is there anything else you want to tell the Foundation?

The Project has been demonstrating that self determination methodologies and philosophy make a positive difference in consumers' lives by creating opportunities for consumers to have the freedom and authority to direct their supports. As consumers accept the benefits and risks for choices made, they become accountable for spending public money in ways that assure health and safety and that are life enhancing. Consumers and their support persons have limited experience with self determination. Changing roles, taking responsibility and approaching service delivery in new ways create challenges. The Project has learned that self determination is not an "all or none" approach, but a transition using informed decision making to live a chosen life.

Minnesota's Project work has created interest and become the foundation for non-project counties to develop self determination work plans and seek additional information and assistance to promote self determination in their regions.

The National Self Determination Project has created both an awareness for the need to change service delivery systems and provided a valuable opportunity for states to take system redesign action. As Self Determination Project participants, the Minnesota Department of Human Services, Blue Earth County, Dakota County and Olmsted County have implemented system redesign, education and individualized budget methodologies that would be transferable to all Minnesota counties.

Minnesota recommends that the Foundation continue to support communication and sharing information amongst interested states. The Self Determination Web-site and intranet have been helpful. Assisting with activities to increase consumer participation in communication activities is also recommended.

Minnesota's Self Determination Project Task and Time Line Status

Tasks	Quarter Activity Range	Year 2 Status (February 1, 1998 - January 31, 1999)
Activity 1: Collect, modify and disseminate materials and educate stakeholders		
Objective 1a: Design curriculum for stakeholder workshops/meetings	1	Completed 2nd quarter
Objective 1b: Conduct workshops for consumers, families, advocates and providers in local sites	2-4	On-going. See bibliography for specific sessions.
Objective 1c: Compile and modify materials for a "tool kit"	1-2	Principles, frameworks, tracking, PR completed 4th quarter. Tool kit areas identified and structure completed 7th quarter. Development of additional items is ongoing.
Objective 1d: Conduct workshops for consumers, families, advocates and providers	5-12	Workshops conducted throughout Year 2 in individual county project sites. See bibliography for specific sessions.
Objective 1e: Conduct annual conference for sites and other interested stakeholders	4, 8, 12	Mpls. was the site of the annual 1998 National Self Determination conference - 5th quarter. Statewide conference "Passport to the Future" held in 8th quarter.
Activity 2: Local site Implementation		
Objective 2a: Identify and recruit a representative local advisory committee (Blue Earth and Olmsted)	1	Completed quarter preceding project start date
Objective 2b: Identify and recruit a representative local advisory committee (Dakota)	1	Completed
Objective 2c: Hire local project coordinator (Olmsted)	1	Completed prior to project start date
Objective 2d: Hire local project coordinator (Blue Earth and Dakota)	1	Completed
Objective 2e: Develop quality assurance framework	1-2	Completed 4th quarter
Objective 2f: Review allocation methodologies	1-2	Completed 3rd quarter
Objective 2g: Recruit initial group of consumers (n=8 to 20)	1-2	Completed - Total = 53
Objective 2h: Begin implementation with initial group of consumers	3-4	Completed
Objective 2i: Recruit second group of consumers (n=12 to 40)	4	Completed (first recruitment total exceeded expectation)
Objective 2j: Begin implementation with second group of consumers	5-8	Completed
Objective 2k: Recruit third group of consumers (n=12 to 40)	8	Completed -Project participants = 99. Additional consumers affected by self determination methodologies = 531
Objective 2l: Begin implementation with third group of consumers	9-12	N/A this reporting period
Objective 2m: Conduct video conference across three project sites	2-12	None - Face to face meetings have been possible. Plan to use video conferencing in quarters 9-12 for consumer networking and MR/RC Waiver training.

TABLE 2 (continued)

Tasks	Quarter Activity Range	Year 2 Status (February 1, 1998 - January 31, 1999)
Activity 3: State level policy implementation and project management		
Objective 3a: Identify and recruit a representative state advisory committee	1	Completed 1st quarter
Objective 3b: Conduct process evaluation	1-8	Formative evaluation with University of Minnesota -Report 1 completed 7th quarter
Objective 3c: Work with HCBS waiver staff on changes to state waiver plan	1-2	Completed - HCFA approved amendments 4th quarter
Objective 3d: Hire state level project coordinator	1	Completed
Objective 3e: Review and approve functional support and assessment system	1-2	Funding and allocation tools piloted began 6th quarter
Objective 3f: Create annual reports on project implementation	4, 8,12	Completed 4th quarter
Objective 3g: Create summary documentation of project implementation	12	N/A this reporting period

Table 3
State and Local Site-Specific Activities Supporting Project Goals and Objectives

Soal # 1: Improve management and administration of services

Objectives	State	Blue Earth County	Dakota County	Olmsted County
1a. Provide local entities responsibility for local resources and implications for their use	<ul style="list-style-type: none"> -Provided technical assistance for waiver amendment implementation -Supported person centered planning activities -System redesign work focused on increasing service system flexibility 	<ul style="list-style-type: none"> -Developed local policies and procedures to meet requirements for waived service amendments implementation -On-going negotiations with DHS managed care demo team for streamlining funding and capitation -Advisory council providing guidance on how to use local resources and developing frameworks 	<ul style="list-style-type: none"> -Protocols developed for implementing MR/RC waived service provisions 	<ul style="list-style-type: none"> -Developing local policies and procedures to meet requirements for waived service amendments implementation -Received and utilizing efficiency MR/RC Waiver allocations
1b. Develop service approaches to meet the needs of the geographic area being served	<ul style="list-style-type: none"> -Regional technical assistance to counties -Quality conference held Nov. 1998 	<ul style="list-style-type: none"> -Capacity for person centered planning facilitators expanded -People First group organized -Self advocacy training sessions held and on-going schedule developed -Advisory council assisting project -Case managers meet regularly to discuss self determination and provide support and mentoring -MR/RC waiver amendments yielded new approaches to support 	<ul style="list-style-type: none"> -On-going consultation with People First organization to develop capacity for individualized supports -Steering committee meets regularly to provide direction -Collaboration with Dakota County Provider Training Network and local Arc for person centered planning -Collaboration with Southview Bank for implementation of consumer voucher accounts 	<ul style="list-style-type: none"> - 60 person centered planning facilitators available to meet geographic needs -On-going work with People First sub-committees and Arc -Provider education and feedback mechanisms implemented -Region 10 Quality Initiative implemented -Building on generic community resources for supports -Implementing a coordinated community plan for improving recruitment and retention of supports
1c. Increase incentives for people to remain in local communities	<ul style="list-style-type: none"> -Medicaid waiver amendments implemented and information bulletin distributed statewide -Housing workgroup formed to address housing funding and local capacity issues. Housing "decision tree" in development stage 	<ul style="list-style-type: none"> -Extensive work with providers to support consumers re: person centered planning, community issues and system changes -Arc family forums held -County specific brochure developed -Decreasing public guardianship work continues 	<ul style="list-style-type: none"> -Education contracting plan implemented -Informational brochure developed -Community meetings held -Person centered planning implemented -Working with Arc Suburban on housing strategies 	<ul style="list-style-type: none"> -Education contracting plan implemented -Efforts to eliminate public guardianship continue. 20 to 30 persons to have private conservatorship in 1999 -Increasing capacity for generic community business and activities to support consumers -Service delivery model focuses on individual choice
1d. Support local communities to analyze and expand capacity to meet the needs of local citizens	<ul style="list-style-type: none"> -Managed care demonstration project providing cost and consumer data to project sites -Self determination statewide planning initiated 	<ul style="list-style-type: none"> -Education contract plan prioritizes building self sufficiencies in the area of person centered planning and self advocacy 	<ul style="list-style-type: none"> -Data collection and evaluation methodology in place to support analysis of met/unmet needs -Audits developed to identify needs for change, and to support capacity to meet those identified needs 	<ul style="list-style-type: none"> -Region 10 Quality Initiative implemented -Arc assisting to assess additional data regarding met and unmet needs -Individualized consultation support to providers

Objectives	State	Blue Earth County	Dakota County	Olmsted County
1e. Increase competition among service providers and choice of service providers	<ul style="list-style-type: none"> -Waiver amendments encourage providers to unbundle services -Presentations to providers with key points on quality assurance and consumers as customers -Development of Q&A formats focusing on providers 	<ul style="list-style-type: none"> -Presentations to consumers, providers and community members -Encouraging self determination provider incentive strategies -Project ASSURE workgroups addressing transition issues -Provider profile completed Fall 1998 -Transitioning from traditional case management to service coordination is on-going 	<ul style="list-style-type: none"> -Presentations to consumers, providers and community members -Building on numerous service choices available and working to increase non-traditional supports -Collaborating with 7county metro area counties and Arc Suburban to develop a "Guide to Services" that defines common data and is a functional resource for the entrie metro area 	<ul style="list-style-type: none"> -Presentations to consumers, providers, and community members -Individualized planning with consumers created provider competition to meet individual consumer needs -Service coordination options developed -Revised employment contracting process to increase consumer choice -ICF/MR downsizing activities on-going

Goal # 2 : Improve service financing and design

Objectives	State	Blue Earth County	Dakota County	Olmsted County
2a. Provide for and support individual resource allocation and choice	<ul style="list-style-type: none"> -Medicaid waiver amendments support individual budget development -Family support grant and consumer support grant programs provide funds directly to consumers -Computer software in the final development stage to assist with budget tracking -Consumer handbook "Finding the Support You Need" developed with project counties to assist consumers with hiring their own supports. 	<ul style="list-style-type: none"> -Flexible budgets operational in Year 2 -Using person centered planning to support choice -Developed an employer of record option -Developed respite care cash grant option "Family Managed Respite Care" -Piloting allocation methodologies 	<ul style="list-style-type: none"> -Piloting an allocation tool for those new to services -Consumers receiving individual budgets first, then planning -Using historical allocation for persons receiving services -Developed allocation tool for new persons or to assess changing needs -52 consumer checkbook voucher accounts operational -Developed employer of record option for consumers who choose to hire supports and need assistance with employer/employee functions -Using person centered planning to support choice -Designed a tracking system for voucher accounts to be implemented in Year 3 -438 families participating in account management direct cash grant program -Plan completed to use Consumer Support Grant program (starting with 15 people) -Protocol for Consumer-Directed Community Supports (waivered services developed and implemented 	<ul style="list-style-type: none"> -Employer of record RFP finalized -All waived services recipients transitioned to having individual budgets -Local waiver management team changed to encourage more control by consumers and less by county -Financial allocation tool being piloted -Plans developed for individual checking accounts with implementation in Project Year 3 -Continued respite care cash grant program -Expanded used of person centered planning to support choice -Contracting procedures revised -Worked with providers on unbundling and individualizing support costs -Implemented an individual budget worksheet for consistent data presentation so consumers can compare information easily -Plan completed for 20 people to participate in the Consumer Support Grant Program -Collaborative work for innovative supports for persons with autism

Objectives	State	Blue Earth County	Dakota County	Olmsted County
2b. Support individuals and families who are controlling their own resources	<ul style="list-style-type: none"> -Supporting local project sites through MMIS systems revisions -Employment/labor law consultant contract to provide consultation on budget, liability and resource issues -Consumer handbook developed -County resource tool kit in development stage 	<ul style="list-style-type: none"> -Person centered planning and service coordination support available for all consumers -Organized a People First group in the region -Work with local Arc yielded consumer materials and individualized education and support for project participants -"It's My Life" consumer handbook completed and utilized 	<ul style="list-style-type: none"> -Regular communication with families regarding budget management -Tracking system generates consumer friendly reports to consumers -Consumer plan review team established to support case managers who provide individualized support to consumers -On-going consumer informational/training meetings held -Collaboration with Arc Suburban to develop a Guide to Services now joined by 7 metro counties -Organizing consumer support meetings -Seeking consumer direction for training and education 	<ul style="list-style-type: none"> -Developed an individual budget monitoring form for families -Service coordinator position continues to support individuals and families and to mentor county staff -Contract with local Arc and People First to develop methodologies to support individuals and families continued -Informal networking gatherings held for information sharing
2c. Develop and implement a rational means for resource allocation to local entities	<ul style="list-style-type: none"> -System redesign workgroups assisting with resource allocation challenges -Support for individual county activities for piloting allocation tools 	<ul style="list-style-type: none"> -See activities under objective 2a 	<ul style="list-style-type: none"> -See activities under objective 2a -Consumer planning implemented without regard to funding source with a focus on meeting needs rather than "fitting into" service categories 	<ul style="list-style-type: none"> -See activities under objective 2a
2d. Integrate all expenditures into single budgets for flexibility and	<ul style="list-style-type: none"> -Funding streams still tracked separately at the state and federal level -Computer software tracking tool in final development stage to track resources, provide consumer friendly reports, and meet state/federal reporting requirements 	<ul style="list-style-type: none"> -Developing methodologies through the managed care demonstration project 	<ul style="list-style-type: none"> -Individual budgets developed and communicated as simply dollars, not funding streams. -Dispersing methodologies developed so funding streams appear simple and seamless to the consumer -Planned tracking system reports funding streams as per state/federal requirements 	<ul style="list-style-type: none"> -Continued work as part of managed care demonstration project -Developed an internal accounting method so funding streams appear seamless to the consumer -Developed and implemented an individual budget worksheet that focuses on support areas and not funding source
2e. Develop methods and support transition from obsolete services	<ul style="list-style-type: none"> -Stakeholders representing provider and consumer organizations working on transition strategies to share with their memberships 	<ul style="list-style-type: none"> -Project ASSURE service work group developing new/non traditional services -Individualized planning with consumers and families for transition 	<ul style="list-style-type: none"> -Individualized work with providers emphasizing time lines and transitions necessary to support consumer choice and control 	<ul style="list-style-type: none"> -Service delivery workgroup acting in an advisory capacity for transition. -Developed training initiatives with all stakeholders on respecting and supporting individual choice and creative support development
2f. Develop a basic package of services for all persons with developmental disabilities	Objective discontinued- Emphasis on supports based on individual needs rather than limited service categories	Objective discontinued- Emphasis on supports based on individual needs rather than limited service categories	Objective discontinued- Emphasis on supports based on individual needs rather than limited service categories	Objective discontinued - Emphasis on supports based on individual needs rather than limited service categories

Objectives	State	Blue Earth County	Dakota County	Olmsted County
2g. Support greater innovation and benefit in work and other day programs	-Medicaid MR/RC Waiver amendments approved 1997 increased flexibility for individualized supports.	-Working with providers to meet individual consumer job choice changes -Using MR/RC waived services provisions for innovative work supports	-Training provided to direct support staff -Working with providers to accommodate consumer choices for a combination of formal and more relationship based support networks	-Individual work with day providers to support consumer choice, schedule preferences, and work environments continued -Contracting revision promoted natural supports in the workplace -Support assisted provider to develop more creative individualized support options

Goal # 3: Improve access to services

Objectives	State	Blue Earth County	Dakota County	Olmsted County
3a. Increase equity In access and resources for persons with similar needs	-University of Minnesota evaluation - Report 1 completed -Medicaid waiver amendments provide access to consumer training and education from generic community resources -System redesign workgroup continues to work on strategies for funding flexibility and addressing access and equitability issues -Coordinating information sharing on allocation tool use	-Funding allocation tool being designed to allocate funds equitably. Focus is on residential supports	-Evaluating use of resource allocation tool throughout the Project	-Funding allocation tool designed and being piloted
3b. Increase access to and resources for culturally appropriate services	-Contracting for consultation and technical assistance in the areas of community connections, improving access to culturally competent supports, and defining self determination in meaningful ways for all cultures	-Implementing an education contracting plan in the areas of person centered planning, self advocacy and materials development -Coordination with state contract	-Steering committee developed to address the need for culturally appropriate services and to provide recommendations for an action plan -Coordination with state contract -Working with Arc Suburban to identify and respond to needs	-Coordination as part of state contract -Working with local agencies which support individuals from various cultural backgrounds
3c. Provide for local experimentation for expanded eligibility	-University of Minnesota evaluation Report 1 found that Project design and methodologies could be transferable to additional disability groups	-Participating in the managed care demonstration project which encompasses all disability groups -No change in eligibility criteria at this time	-No change in eligibility criteria at this time -Planning and change to be based on analysis of evaluation outcome	-Participating in the managed care demonstration project which encompasses all disability groups. Overall intake and enrollment for funded supports are coordinated across all disability service systems -No change in eligibility criteria at this time
3d. Establish an ethical basis for access decisions	Objective discontinued	Objective discontinued	Objective discontinued	Objective discontinued

Goal #4: Improve quality assurance and monitoring

Objectives	State	Blue Earth County	Dakota County	Olmsted County
4a. Design locally based system of quality assurance with consumer and family input within guidelines established by federal and state governments	-Self Determination Project quality assurance plan includes and links quality goals and outcomes from division initiative, managed care demonstration project, performance based contracting, and the local project sites -Self Determination Project supported Future's Initiative concept paper for legislative changes	-Developing variance to consolidated standards -Work on local quality assurance plan on-going	-Working jointly with University of Minnesota to design long term system evaluation -Developed quality evaluation protocol modeled after IEIC -Collected and analyzed (on-going) data on staffing patterns, staffing planned and delivered, incidents/VA: correction and improvement	-Region 10 Quality Assurance Initiative began implementing tool 1/99 (QA teams include family members, professionals and community members) -Persons with disabilities and their families are participating on the QA commission -Developing a report format that includes best practices and highlights formal and informal support providers
4b. Make choice and control an integral part of the definition of quality	-Self Determination Project quality framework and action plan, education efforts, system redesign, and individually controlled budget development promote consumers defining quality and satisfaction for themselves based on choices made	-Education and support for choice occurring at the level of individual planning	-Choice and control are part of the quality definition in the evaluation protocol. County policy assures consumer planning and purchasing supports adhere to the protocol	-Through person centered planning, consumers define quality for themselves. The QA Initiative actively involves consumers -Provided training regarding working as a team, with emphasis on empowering consumers
4c. Link quality assurance systems with quality improvement support services	-First year of consolidation standards implementation completed. Standards move from checklist licensing reviews to consumer outcome based reviews	-Project ASSURE developing quality links through service design workgroup. -Links with PBC Project -Variances to consolidated standards	-Quality improvement is part of the evaluation protocol being used	-Region 10 Quality Initiative

Goal # 5: Redesign Roles

Objectives	State	Blue Earth County	Dakota County	Olmsted County
5a. Renegotiate and redesign traditional roles of governmental administrative employees as necessary to achieve project goals	- MR/RC waiver amendments implemented to increase service coordination choices -CSMD Division revised its mission and vision to focus on self determination as a philosophy for alt division work -Consolidated standards legislation promotes outcome based methodologies	-Single plan individual service plan being piloted -County employees participating in training with emphasis on changing roles, building community and frameworks for accomplishment -Decreasing public guardianship efforts have yielded 13 persons finding other guardianship options that build relationships and are person centered -Developed working relationship with DHS Licensing to implement consolidated standards variances	-Intensive case manager training emphasizing facilitation and support roles -Consumers may choose service coordinators. The county continues to be responsible for eligibility determinations, budget development, plan approval and evaluation -Consumers choose and pay providers directly -Provider involvement consistently stresses role changes	-Activities and mentoring are transitioning county case management to a role of relationship based service coordination -Social services and Project staff working with internal county departments (i.e. financial and information systems) regarding role changes

Objectives

5b. Establish appropriate support system to assist local entities, consumers, families and service providers to fulfill new roles

State

- Computerized budget tracking system in final development stage
- Frameworks for a resource tool kit developed
- Cultural diversity contract being developed
- Quality conference held -11/98

Blue Earth County

- Self advocacy training is on-going
- People First organization continues operation
- Facilitating direct service "round table" discussion
- Participating in consumer controlled housing workgroup
- Peer mentoring program developed and to be piloted in Project Year 3

Dakota County

- Participation in consumer controlled housing workgroup
- Consumer advisory groups established in partnership with People First and Arc Suburban
- Monthly Steering Committee meetings held
- Monthly Consumer Advisory meetings held
- Consumers Guide to Services developed in collaboration with local Arc focus groups
- Designing an automated voucher account tracking and reporting system to benefit both consumers and county

Olmsted County

- Local Arc hired to assist with PR
- Public guardianship elimination initiative on-going
- Establish on-going networking groups for consumers participating in the project
- Participation in consumer controlled housing workgroup

5c. Evaluate project implementation and outcomes to refine project as needed

- Stakeholder meetings and workgroups used for evaluation on a quarterly basis
- University of Minnesota evaluation Report 1 completed
- On-going coordination with RWJF evaluation team

- Steering Committee and advisory groups providing direction
- Regular feedback from Project participants

- Steering Committee and advisory groups providing direction

- Feedback mechanism in place to receive information through individual/family networking groups
- Survey developed
- Steering Committee and advisory groups providing direction

Annual Progress Report - Year 2 (February 1,1998 - January 31,1999)

BIBLIOGRAPHY

CONFERENCES. MEETINGS. PRESENTATIONS. WORKSHOPS

Type: Workshop

Title: Single Plan Training - Self Determination Components

Date: 1/27/98 (not reported in Year 1)

Place: Mankato, MN

Number Attending: 100 (county case managers and support staff)

Presenter: Trish Reedstrom, Blue Earth County Project Coordinator

Content/Notes: Developing a single service/support plan emphasizing self determination

Type: Meeting

Title: Family Forum - Arc

Date: 2/5/98

Place: Mankato, MN

Number Attending: 25 families

Presenter: Trish Reedstrom, Blue Earth County Project Coordinator

Content/Notes: Self Determination Project update and information on how self determination can affect **lives**

Type: Meeting

Title: Region 9 case managers meeting

Date: 2/12/98

Place: North Mankato, MN

Number Attending: 25 case managers

Presenter: Barb Roberts, State Project Coordinator and Trish Reedstrom, Blue Earth County Project Coordinator

Content/Notes: General information session regarding Minnesota's Self Determination Project

Type: Meeting

Title: Northeast Regional Case Managers Meeting

Date: 2/20/98

Place: Cloquet, MN

Number Attending: 10 case managers

Presenter: Trish Reedstrom, Blue Earth County Project Coordinator

Content/Notes: General information session regarding Minnesota's Self Determination Project and county **involvement**

Type: Presentation

Title: The Changing Service System

Date: 2/25/98

Place: Hiawatha Homes Annual Board Strategic Planning , Rochester, MN

Number Attending: 50 (provider and support staff)

Presenter: Paul Fleissner, Olmsted County Supervisor

Content/Notes: Overview of changes being made to the service delivery system and their impact on individuals, families and professionals

Type: Presentation
Title: Self Determination - Changing Roles
Date: 3/98
Place: Lifeworks, Eagan, MN
Number Attending: 12 executive staff of board of director members
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information presented on changing roles and opportunities for providers

Type: Presentation
Title: Self Determination
Date: 3/2/98
Place: Mankato, MN
Number Attending: 8 - MRCI Board of Directors
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: General information presentation to local provider

Type: Presentation
Title: Self Determination Project and the South Mental Health Initiative
Date: 3/3/98
Place: St. Paul, MN
Number Attending: 40 - Minnesota's Future Initiative Group representing support stakeholders
Presenter: Trish Reedsfrom, Blue Earth County Project Coordinator
Content/Notes: Overview presentation to Future's Initiative group

Type: Presentation
Title: The Changing Service System
Date: 3/3/98
Place: Olmsted County - Community Working Group
Number Attending: 40 community support persons and stakeholders
Presenter: Paul Fleissner, Olmsted County Supervisor
Content/Notes: Overview of changes being made to the service delivery system and their impact on individuals, families and professionals

Type: Presentation
Title: Project Foresight and Self Determination
Date: 3/14/98
Place: Rochester, MN
Number Attending: 20 parents
Presenter: Becky Fluegel, Olmsted County Project Support Staff
Content/Notes: General information on self determination presented to parents of children and adults with disabilities

Type: Meeting
Title: Guardianship
Date: 3/18/98
Place: Mankato, MN
Number Attending: 30 families
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Informational session on guardianship for families who have relatives under state guardianship

Type: Conference

Title: Minnesota's Self Determination Project - Exhibitor.

Date: 3/18-19/98

Place: Minnesota Social Services Association Annual Conference, Bloomington, MN

Number Attending: 800 case managers, county personnel, providers and consumers

Presenter: Barb Roberts, State Self Determination Project Coordinator

Content/Notes: Information booth, materials distribution

Type: Meeting

Title: Participant Networking

Date: 3/23/98

Place: Rochester, MN

Number Attending: 15 project participants, and their families and/or guardians

Presenter: Facilitated by Polly Owens, Olmsted County Project Coordinator

Content/Notes: An informal gathering of Project participants to share stories and support each other.

Project staffs role was to arrange and facilitate the gathering.

Type: Workshop

Title: "Same Beat, Different Drummer-

Date: 3/23/98

Place: South St. Paul, MN

Number Attending: 100 case managers, families, interested persons

Presenter: Bahiya Cabral Asante and Nkosi Ali Asante

Content/Notes: Taking responsibility for building community

Type: Presentation

Title: Project Foresight and Self Determination

Date: 3/31/98

Place: Rochester, MN

Number Attending: 20 parents

Presenter: Polly Owens, Olmsted County Self Determination Project Coordinator

Content/Notes: Basic information on self determination presented to parents of adults with disabilities

Type: Presentation

Title: Self Determination and Change

Date: 3/30/98

Place: St. Paul, MN

Number Attending: 20 day training and habilitation staff from MHC

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Presentation to staff regarding the basics of self determination, rate flexibility, fair competition, and developing new ways of contracting

Type: Presentation

Title: Self Determination: Shifting powers and new Ways of Contracting and Delivering Services

Date: 4/98

Place: Community Involvement Programs, Minneapolis, MN

Number Attending: 65 Board members and guests

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Information sharing regarding shifting power and new ways of contracting, role changes and delivering services

Type: Presentation
Title: New Service Delivery
Date: 4/98
Place: St. Paul, MN
Number Attending: 8 Midway Training Center Management Staff
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Preparing for change using self determination methodologies

Type: Presentation
Title: Provider strategies and update
Date 4/7/98
Place: MHC Board of Directors meeting, Arden Hills, MN
Number Attending: 25 providers and MHC Board of Directors
Presenter Barb Roberts, State Self Determination Project Coordinator; Steve Larson, Director CSMD Division, Minnesota Department of Human Services
Content/Notes: Self Determination information and state perspectives presentation to the Minnesota Habilitation Coalition (DT&H)

Type: Meeting
Title: Self Determination Projects Updates
Date: 4/14-15/98
Place: LaCrosse WI - Upper Mississippi Self Determination Consortium
Number Attending: 45 - Project support staff from Iowa, Wisconsin and Minnesota, advocates, parents and interested persons
Presenter: Barb Roberts, Trish Reedstrom, Polly Owens, Karen Courtney - Minnesota's Self Determination Project
Content/Notes: Strategizing and information sharing across projects and update reports

Type: Presentation
Title: Self Determination - Future Services
Date: 5/98
Place: St. Ann's, Minneapolis, MN
Number Attending: 8 executive staff and board of directors members
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information on the meaning of self determination for the future of services

Type: Presentation
Title: Self Determination - Future Services
Date: 5/98
Place: Mary T, Inc., Minneapolis, MN
Number Attending: 20 executive and management staff
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Important factors when supporting people and why greater choice and control is important

Type: Presentation
Title: Self Determination - Changing Roles
Date: 5/98
Place: Lutheran Social Services
Number Attending: 7 executive staff
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Changing roles and opportunities for providers, information on becoming an employer of record, and agency organizational structures to support self determination

Type: Presentation
Title: The Importance of Self Determination
Date: 5/98
Place: Dakota County, South St. Paul, MN
Number Attending: 5 St. Louis County supervisors and case managers
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: The difficulties to move toward self determination and overcoming the difficulties

Type: Presentation
Title: The Changing Service System
Date: 5/4/98
Place: Rochester, MN
Number Attending: 8 - Parents Forever Group
Presenter: Paul Fleissner, Olmsted County Supervisor
Content/Notes: Overview of changes being made to the service delivery system and their impact on individuals, families and professionals

Type: Conference
Title: Celebrate '98 - Dreams to Realities ARRM Annual Conference
Self Determination Project - Exhibitor
Date: 5/6-8/98
Place: Bloomington, MN
Number Attending: 1,000 case managers, providers, persons with disabilities, advocates, families
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Self Determination information and materials distribution

Type: Conference
Title: Celebrate '98 - Dreams to Realities ARRM Annual Conference
"They have the Cash and Assets: Who Will be Their Provider - Panel Discussion
Date: 5/7/98
Place: ARRM Annual Conference, Bloomington, MN
Number Attending: Conference: 1,000 case managers, providers, persons with disabilities, advocates, families, 60 attended the individual panel discussion
Presenter: Barb Roberts, State Project Coordinator; Bruce Nelson, ARRM Director, Laura Doyle, DHS CSMD Deputy Director, Bob Brick, Arc Director, Milt Conrath, Dakota County Director, D. Bill Olson, Provider, Angela, consumer
Content/Notes: Self Determination information and materials distribution

Type: Conference - Panel Presentation
Title: What Services Should Look Like in the Future: Various Perspectives
Date: 5/8/98
Place: ARRM Annual Conference, Bloomington, MN
Number Attending: 50 case managers, providers, persons with disabilities, advocates
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Sharing perspectives on systems change

Type: Presentation
Title: Self Determination: Case managers role and consumer control
Date: 5/10/98
Place: Anoka County, Anoka, MN
Number Attending: 10 DD administrative staff and planners
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information sharing on role changes, consumer control and self determination

Type: Meeting
Title: Minnesota's Self Determination Project Update
Date: 5/13/98
Place: HCFA Listening Session - St. Louis, MO
Number Attending: 15 Self Determination Project states and interested persons
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Overview of Minnesota's Project and discussion regarding self determination and federal issues

Type: Conference Breakout Session Presentation
Title: Self Determination and Community Inclusion
Date: 5/16/98
Place: 4th Annual Health Care Financing Administration Midwest Conference on Quality of Life Issues, St. Louis, MO
Number Attending: 450 providers and state government representatives attending, 50 attended breakout session
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Focus on empowering persons with disabilities to control their supports and lives, plus Minnesota's experience

Type: Presentation
Title: Self Determination Overview
Date: 5/15/98
Place: Harry Meyering Center, Mankato, MN
Number Attending: 10 staff members
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Discussion of self determination and provider role changes

Type: Workshop
Title: Self Determination Overview
Date: 5/19/98
Place: Harry Meyering Center, Mankato, MN
Number Attending: 20 HMC staff
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: In-service training for staff and promoting self determination

Type: Workshop -Breakout Session Presentation
Title: Best Practices Initiatives - Panel Discussion
Date: 5/20/98
Place: Case manager Introduction To Disabilities Training, Arden Hills, MN
Number Attending: 55 case managers
Presenter: Barb Roberts, State Self Determination Project Coordinator; Marge Brchan, CSMD Supervisor; Jan Kooistra, PBC Demonstration,
Content/Notes: General information on Minnesota initiatives and links to outcome based supports

Type: Presentation
Title: Self Determination Overview
Date: 5/21/98
Place: Region V Alliance, Brainerd, MN
Number Attending: 12 county supervisory staff
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Question and answer session regarding self determination and county activities/role changes

Type: Presentation
Title: The Changing Service System
Date: 5/28/98
Place: PossAbilities, Rochester, MN
Number Attending: 10 board of directors members
Presenter: Paul Fleissner, Olmsted County Supervisor
Content/Notes: Overview of changes being made to the service delivery system and their impact on individuals, families and professionals

Type: Presentation
Title: Self Determination - Strategic Planning
Date: 6/98
Place: DCI, St. Paul, MN
Number Attending: 20 executive staff and board of directors members
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Residential support services planning and strategies to promote self determination

Type: Presentation
Title: Self Determination - Future Services
Date: 6/98
Place: Mary T., Inc. Minneapolis, MN
Number Attending: 18 program managers and lead staff
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information regarding what is important when supporting people and why greater choice and control is important

Type: Presentation
Title: Self Determination - Planning for the Future
Date: 6/98
Place: Focus Homes, St. Paul, MN
Number Attending: 11 board of directors members
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Presentation to assist Focus Homes with planning for the future

Type: Presentation
Title: Self Determination - Asserting Rights
Date: 6/98
Place: Interact Theater, Minneapolis, MN
Number Attending: 12 Board Members and clients
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information on clients asserting rights and people getting the information they need -

Type: Presentation
Title: Self Determination - What Does That Mean?
Date: 6/98
Place: PACER, Minneapolis, MN
Number Attending: 15 PACER staff
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information sharing regarding self determination, how the system is changing and the changing role of advocacy

Type: Presentations

Title: Concepts of Self Determination

Date: 6/98

Place: Arc of Hennepin County, Minneapolis, MN

Number Attending: 32 (2 sessions) Board members and Arc staff

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Presentation on concept of self determination and shifting power to consumers

Type: Presentation

Title: Self Determination - Changing Residential Services

Date: 6/98

Place: Mains'l, Inc., Minneapolis, MN

Number Attending: 5 Executive staff

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Presentation regarding changing residential services and advocacy

Type: Workshop

Title: Community Conversations

Date: 6/2/98

Place: West St. Paul, MN

Number Attending: 68 case managers, families, interested persons

Presenter: Karen Courtney, Dakota County Self Determination Project Coordinator

Content/Notes: Follow session to "Same Beat Different Drummer" Conference on community building

Type: Conference

Title: Keynote Address - Self Determination Underway in Minnesota

Date: 6/8/98

Place: Putting People First II Conference, Rosemount, MN

Number Attending: 300 providers, consumers, families, county staff, interested persons attending, 25 attended the breakout session

Presenter: DHS Commissioner David Doth

Content/Notes: Recognizing state initiative efforts including self determination

Type: Conference - Breakout Session Presentations

Title: Parent Perspectives

Date: 6/9/98

Place: Putting People First II Conference, Rosemount, MN

Number Attending: 300 providers, consumers, families, county staff, interested persons attending, 25 attended the breakout session

Presenter: LuAnn Olen and Janet Wassman, parents

Content/Notes: Self determination and parent/staff relationships

Type: Conference - Breakout Session Presentations

Title: What, Who and Why - Self Determination Underway in Minnesota

Date: 6/9/98

Place: Putting People First II Conference, Rosemount, MN

Number Attending: 300 providers, consumers, families, county staff, interested persons attending, 25 attended the breakout session

Presenter: Barb Roberts, Self Determination Project Coordinator, Polly Owens, Olmsted County Coordinator, Karen Courtney, Dakota County Coordinator; Trish Reedstrom, Blue Earth County Coordinator

Content/Notes: General self determination information and individualized stories regarding life changes

Type: Conference - Breakout Session Presentation

Title: The Changing Service System

Date: 6/9/98

Place: Putting People First Conference II, Rosemount, MN

Number Attending: 20 providers, case managers, family members

Presenter: Paul Fleissner, Olmsted County Supervisor

Content/Notes: Overview of changes being made to the service delivery system and their impact on individuals, families and professionals

Type: Conference - Breakout Session Presentations

Title: Self Determination

Date: 6/9/98

Place: Putting People First Conference, Bloomington, MN

Number Attending: 25 providers, case managers, family members

Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator

Content/Notes: One breakout session and 2 panel discussions regarding self determination principles, role changes and Blue Earth County experiences

Type: Conference - Breakout Session Presentation

Title: Update on Minnesota's Self Determination Project

Date: 6/10/98

Place: Putting People First Conference II, Rosemount, MN

Number Attending: 300 providers consumers, families, county staff, interested persons attending, 20 attended the breakout session

Presenter: Barb Roberts, Self Determination Project Coordinator

Content/Notes: General overview of self determination principles and Project activities/progress

Type: Workshop

Title: Focusing on the Person

Date: 6/13/98

Place: ELM, Mankato, MN

Number Attending: 10 staff

Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator

Content/Notes: ELM staff meeting and working session on focusing on the person

Type: Presentation

Title: Self Determination Overview

Date: 6/20/98

Place: People First of Olmsted County, Rochester, MN

Number Attending: 30 People First members

Presenter: Jeff Boell, Self Determination Project Participants, and Polly Owens, Olmsted County Self Determination Project Coordinator

Content/Notes: Basic overview of the principles and Jeffs insight into what had changed in his life

Type: Meeting

Title: Self Determination Informational Session

Date: 6/23-24/98

Place: West St. Paul and Apple Valley, MN

Number Attending: 26 families and interested persons

Presenter: Karen Courtney, Dakota County Self Determination Project Coordinator

Content/Notes: Overview of self determination and implications of participation

Type: Presentation

Title: Self Determination - Shifting the Power

Date: 7/98

Place: Fraiser, Minneapolis, MN

Number Attending: 40 executive staff and board of directors

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Information presented on shifting the power, the changing role of providers and opportunities for new ventures

Type: Presentation

Title: Self Determination: New Ways of Creative Services and Support

Date: 7/98

Place: Arc of Anoka and Ramsey County, St. Paul, MN

Number Attending: 8 Arc staff

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Information sharing on self determination, power shifts and new ways of creating services and supports

Type: Presentation

Title: Self Determination - State Perspectives

Date: 7/7/98

Place: Olmsted County, Rochester, MN

Number Attending: 18 case managers and county supervisors

Presenter: Barb Roberts, Self Determination Project Coordinator

Content/Notes: State support for self determination, activities and planning

Type: Conference

Title: Minnesota's Project

Date: 7/9-10-11/98

Place: National Self Determination Conference, Minneapolis, MN

Number Attending: 750 consumers, advocates, providers, governmental staff, state project staff

Presenter: National and local speakers (See conference materials listing)

Content/Notes: Minnesota played an active in role in coordination, breakout session presentations, and general conference activities

Type: Presentation

Title: Self Determination Overview

Date: 7/14/98

Place: MBW, New Ulm, MN

Number Attending: 25

Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator

Content/Notes: Self determination overview and roles of residential providers

Type: Workshop

Title: The Changing Role of County Case Managers

Date: 7/14/98

Place: Olmsted County, Rochester, MN

Number Attending: 30 county case managers

Presenter: Dennis Harkins, A Simpler Way

Content/Notes: An introduction to principles of self determination and a discussion on the effect of self determination on the role of the county case manager

Type: Presentation

Title: Self Determination Project - An Overview

Date: 7/28/98

Place: State County Supervisors Meeting, Roseville, MN

Number Attending: 50 county supervisors

Presenter: Barb Roberts, State Self Determination Project Coordinator

Content/Notes: Overview of self determination activities, principles and role changes for county agencies

Type: Presentation

Title: Self Determination: New Ways of Delivering Services

Date: 8/98

Place: Midwest Special Services, St. Paul, MN

Number Attending: 10 executive and management staff

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Information sharing on self determination, power shifts and management roles

Type: Workshop

Title: Promoting Self Determination or Abandoning Care: Revisiting Core Social Work Values; Where Does Professional Responsibility Begin and End

Date: 8/10/98

Place: Dakota County South St. Paul, MN

Number Attending: 25 social workers and supervisory staff

Presenter: Tony Bibus, Associate Professor of Social work, Augsburg College, Mpls, MN

Content/Notes: Exploring personal values, social work ethics and barriers and supports for self determination

Title: Meeting

Title: Orientation to Self Determination

Date: 8/20-21/98

Place: West St. Paul and Apple Valley, MN

Number Attending: 28 self determination project participants

Presenter: Karen Courtney, Dakota County Self Determination Project Coordinator

Content/Notes: Project orientation sessions

Type: Presentation

Title: New and Changing Roles in Self Determination

Date: 9/98

Place: Owobopte Industries, Eagan, MN

Number Attending: 5 management staff

Presenter: Milt Conrath, Dakota County Supervisor

Content/Notes: Information to day program management staff regarding role changes

Type: Meeting

Title: Role Changes and Self Determination

Date: 9/1/98

Place: Ramsey County, St. Paul, MN

Number Attending: 7 day habilitation providers and county staff

Presenter: Karen Courtney, Dakota County Self Determination Project Coordinator

Content/Notes: Information presentation and discussion on power shifts and role changes in self determination

Type: Presentation
Title: Self Determination and System Redesign
Date: 9/2/98
Place: PCATask Force, St. Paul, MN
Number Attending: 25 professional policy staff
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Overview of self determination and links to PCA redesign

Type: Workshop
Title: The Changing Role of the Direct Support Professional
Date: 9/9-10/98
Place: Rochester, MN
Number Attending: 85 direct support staff and managers from provider agencies
Presenter: Dennis Harkins, A Simpler Way
Content/Notes: An introduction to the principles of self determination, how to think differently about providing supports and a discussion of the role of direct support staff in supporting self determination

Type: Presentation
Title: Arc Forum - Supports and Services
Date: 9/12/98
Place: Mankato, MN
Number Attending: 30 Arc members and interested persons
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Discussion on supports and services for persons with developmental disabilities

Type: Presentation
Title: Self Determination - System Redesign
Date: 9/17-18/98
Place: Norwest DAC Association Annual Conference, Pellican Lake, MN
Number Attending: 100 direct support staff and supervisors of day training and habilitation programs
Presenter: Barb Roberts, State Self Determination Project Coordinator, Jane Wiemerslage, Project Consultant
Content/Notes: 2 presentations to administrative staff and direct support staff regarding self determination, change, and activities that help promote self determination

Type: Conference Breakout Session Presentation
Title: Self Determination Overview
Date: 9/18/98
Place: SCOPE Conference, Mankato, MN
Number Attending: 100 direct support staff
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Four 1 hour breakout sessions presented regarding self determination related topics

Type: Presentation
Title: Self Determination Overview
Date: 9/29/98
Place: ELM Homes, Mankato, MN
Number Attending: 25 provider staff
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Follow up presentation and information to 6/13/98 session

Type: Presentation
Title: Self Determination Project Update
Date: 9/30/98
Place: Region 9 county case manager meeting, Mankato, MN
Number Attending: 25 county case managers
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Project updates and question and answer session

Type: Presentation
Title: Helping the Self Determination Process
Date: 10/98
Place: ARRM, St. Paul, MN
Number Attending: 17 executive committee members
Presenter: Milt Conrath, Dakota County Supervisor
Content/Notes: Information presentation regarding how to assist with changing the current system and the role of self determination in the process

Type: Presentation
Title: Self Determination Overview
Date: 10/5/98
Place: Day, Respite, and Infant Services Symposium on Outcome-Based Performance Measures, San Pedro, CA, California Department of Developmental Services
Number Attending: 200 providers, state staff and Developmental Center staff
Presenter: Troy Mangan, PhD, Minnesota's Managed Care Demonstration Project
Content/Notes: Overview of Minnesota's Project and links to managed care

Type: Conference Breakout Session Presentation
Title: Minnesota's Self Determination Project - Progress, Challenges and Preparing for the Future
Date: 10/13/98
Place: St. Louis County Human Service Conference, Duluth, MN
Number Attending: 375 county social workers and providers
Presenter: Barb Roberts, State Self Determination Project Coordinator; Jane Wiemerslage, Project Consultant
Content/Notes: Overview of Minnesota's project and managing change through system redesign, education and individual budgets

Type: Presentation
Title: Self Determination Project Overview and Changing Roles
Date: 10/15/98
Place: Region VIII North Case Managers Meeting, Marshall, MN
Number Attending: 35 county case managers
Presenter: Barb Roberts, State Self Determination Project Coordinator; Jane Wiemerslage, Project Consultant
Content/Notes: Self Determination overview and question and answer session. Emphasis on role changes for case management

Type: Workshop
Title: Promoting Self Determination or Abandoning Care: Revisiting Core Social Work Values; Where Does Professional Responsibility Begin and End?
Date: 10/19/98
Place: Dakota County South St. Paul, MN
Number Attending: 25 social workers and supervisory staff
Presenter: Tony Bibus, Associate Professor of Social work, Augsburg College, Mpls, MN
Content/Notes: Part II of August workshop. Exploring personal values, social work ethics and barriers and supports for self determination and relationships to work in Dakota County

Type: Meeting

Title: Upper Mississippi Self Determination Consortium

Date: 10/20-21/98

Place: LaCrosse, Wisconsin

Number Attending: 45 people involved with Self Determination Projects in Iowa, Wisconsin and Minnesota

Presenter: Minnesota Project Coordinators and support staff

Content/Notes: Updates on Project activities

Type: Conference, Breakout Session Presentations

Title: Minnesota's Self Determination Project

Date: 11/1-4/98

Place: 16th Annual Home and Community Based Services Conference, Las Vegas, NV

Number Attending: 500 people representing governmental agencies, providers, consumers and advocates from 43 states

Presenter: Barb Roberts, State Self Determination Project Coordinator

Content/Notes: Information and updates on Minnesota's Self Determination Project and waived services for persons with mental retardation and related conditions

Type: Presentation

Title: Self Determination Overview

Date: 11/9/98

Place: Foster Care Providers meeting, Mankato, MN

Number Attending: 25 family foster care providers

Presenter: Trish Reedstrom Blue Earth County Self Determination Project Coordinator

Content/Notes: Self determination principles and applying principles to family foster care

Type: Workshop

Title: The Changing Role of the Direct Support Professional

Date: 11/9/98

Place: Rochester, MN

Number Attending: 35 direct support staff and managers from provider agencies

Presenter: Dennis Harkins, A Simpler Way

Content/Notes: An introduction to the principles of self determination, how to think differently about providing supports and a discussion of the role of direct support staff in supporting self determination

Type: Presentation

Title: Self Determination

Date: 11/10/98

Place: Washington County, Stillwater, MN

Number Attending: 20 Anoka and Washington County social workers and supervisory staff

Presenter: Karen Courtney, Dakota County Self Determination Project Coordinator and Becky Fluegel, Olmsted County Project Support Staff

Content/Notes: Presentation on the concept of self determination and a participant-driven managed supports, implementation processes in Dakota County and Olmsted County

Type: Presentation

Title: Managed Care Program Trends of the Future

Date: 11/13/98

Place: Minneapolis, MN

Number Attending: 18 stakeholders

Presenter: Karen Courtney, Dakota County Self Determination Project Coordinator

Content/Notes: Participant-driven supports concepts and self determination

Type: Meeting
Title: People First Leadership
Date: 11/16/98
Place: People First of Olmsted County, Rochester, MN
Number Attending: 8 People First members
Presenter: People First members and Polly Owens, Olmsted County Self Determination Project Coordinator
Content/Notes: Discussion of how to work together to make more people with disabilities aware of self determination principles and how to get what is needed from the system and support providers

Type: Conference - Breakout Session Presentation
Title: Blue Earth County's Self Determination Project
Date: 11/16/98
Place: Passport to the Future - Quality Conference, Bloomington, MN
Number Attending: 400 people including, families, providers, case managers, supervisors, direct support staff attending the conference, 35 attending the breakout session
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Overview of Blue Earth County's activities and involvement with the Self Determination Project

Type: Conference - Breakout Session Presentations
Title: Minnesota's Self Determination Project
Date: 11/16-17/98
Place: Passport to the Future - Quality Conference, Bloomington, MN
Number Attending: 400 people including, families, providers, case managers, supervisors, direct support staff attending the conference, 60 attending breakout sessions and round table discussions
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Overview of Minnesota's Project

Type: Presentation
Title: Self Determination - Life Changes Q & A
Date: 11/30/98
Place: People First of Olmsted County, Rochester, MN
Number Attending: 30 People First members and interested persons
Presenter: Tara Ramaker, Project Participant and Polly Owens, Olmsted County Self Determination Project Coordinator
Content/Notes: Tara told the audience what she had changed in her life and answered questions from the audience

Type: Meeting
Title: People First Self Determination Work Group
Date: 12/7/98
Place: People First, Rochester, MN
Number Attending: 6 People First members
Presenter: People First members and Polly Owens, Olmsted County Self Determination Project Coordinator
Content/Notes: Discussion regarding People First taking a lead role in forming an advisory group to support them in advocating for self determination principles

Type: Meeting
Title: Self Determination
Date: 12/9/98
Place: Dakota County, South St. Paul, MN
Number Attending: 17 social workers, supervisory staff from Crow Wing, Todd, Wadena, Morrison and Cass counties
Presenter: Karen Courtney, Milt Conrath, Greg Kruse, Dakota County Self Determination Project; 2 Dakota County social workers
Content/Notes: Sharing self determination information and process with Minnesota counties interested in pursuing self determination philosophy and methodologies

Type: Presentation
Title: Minnesota's Self Determination Project - Overview and System Redesign
Date: 12/10/98
Place: Traumatic Brain Injury Task Force, St. Paul, MN
Number Attending: 35 task force members including family members, professionals and interested persons
Presenter: Barb Roberts, State Self Determination Project Coordinator
Content/Notes: Overview of Minnesota's Self Determination Project

Type: Presentation
Title: Self Determination Project
Date: 1/12/99
Place: Social Services Task Force Blue Earth County, Mankato, MN
Number Attending: 8 social services staff members
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: Update on Self Determination Project activities

Type: Presentation
Title: Minnesota's Self Determination Project - Overview and System Redesign
Date: 1/19/99
Place: Ramsey County Case Manager Meeting, St. Paul, MN
Number Attending: 42 county case managers and supervisory staff
Presenter: Barb Roberts, Self Determination Project Coordinator; Jane Wiemerslage, Project Consultant
Content/Notes: Project overview, emphasis on role changes and question and answer session

Type: Meetings
Title: Round Table Discussions - Self Determination Selected Topics
Date: Monthly throughout Project Year 2
Place: Mankato, MN
Number Attending: Average 10 people, professionals and families
Presenter: Trish Reedstrom, Blue Earth County Self Determination Project Coordinator
Content/Notes: General round table discussion throughout the year on topics related to self determination

PUBLICATIONS. NEWSLETTER ARTICLES

Reedstrom, Trish. *It's My Life, A Handbook for People with Developmental Disabilities and Their Families*, Blue Earth County. 1998.

Fleissner, Paul. "Changes are Coming!". *Project Foresight News*. April 1998.

Reedstrom, Trish. "Creating Alternatives To Public Guardianship". *The County Lines*. April 1998.

Reedstrom, Trish. "Self Determination Project Offers Training Opportunities". *SMHI Update*. Volume 1, No. 3, June 1, 1998.

Reedstrom, Trish. "Self Determination National Conference Held in Minneapolis", " Brent's Story", Self Determination Project Co-Sponsors Supports and Services Forum for Persons with Disabilities". *SMHI Update*. Volume 2, No. 4, August 1,1998.

Pollster, B. H., Blake, E.M., Prouty, R.W. & K. Charlie Lakin. "Minnesota's Self Determination Project for Persons with Developmental Disabilities - A Project Partnership", *Reinventing Quality, 1998 Sourcebook of Innovative Program's for the Quality Assurance and Quality Improvement of Community Services*. Minneapolis: University of Minnesota, Research and Training Center on Community Living, Institute on Community Integration (UAP). September 1998.

Minnesota's Self Determination Project Education Workgroup, *Finding the Support You Need*, Fall 1998. Edited by the Design Company and in consultation with Hoff, Barry and Kuderer.

"Self Determination Gives Family A World of Hope for Son with Autism", "Three County Project Offers Greater Choices for People with Disabilities". *DHS News*. Volume 9, No. 2, Autumn 1998.

Owens, Polly. "What is a Service Coordinator Anyway?". *Project Foresight News*. December 1998.

Reedstrom, Trish. "SD Project and SMILES Explore Peer Mentoring Opportunity", " The Self Determination Project for Persons with Developmental Disabilities Tries Doing Things Differently". *SMHI Update*. Volume 2, No. 1, January 1,1999.

WEB PAGE

Minnesota's Department of Human Services added a self determination page to their website on 3/16/98: www.dhs.state.mn.us.healthcare/cc/selfdet.htm